



The Door Tehran Kicked Open: MBS, The Bomb, and The Battle for The Gulf

April 29, 2026

Featuring

Hosted by Mark Dubowitz

DUBOWITZ: Welcome to *The Iran Breakdown*. I'm your host, Mark Dubowitz. For more than four decades, the contest between Tehran and Riyadh has been the organizing axis of Middle East geopolitics – a cold war between a revolutionary theocracy and a kingdom that until recently defined itself as the steward of Sunni Islam and the status quo. Today, both poles of that contest are being remade in real time. Iran's Supreme Leader Ali Khamenei is dead. The Islamic Republic is reeling from the joint US-Israel campaign. The Strait of Hormuz is contested. Saudi Arabia publicly lobbied against the strikes while privately urging President Trump to act and is now pressing Washington not to walk away from the job. Riyadh's message to the White House is unambiguous: do not leave Iran with a chokehold on Hormuz. Do not leave the regime with the nuclear, missile, and drone capabilities it has used and will use again to threaten the kingdom and the Gulf.

And looming over all of it is the question of whether Saudi Arabia, long warned by its de facto ruler that “if Iran gets a bomb we will follow,” is about to walk through a door that the Iranians may have just kicked open. To break this down, I'm joined by one of the foremost scholars of the Arabian Peninsula in the world. Bernard Haykel is a professor of Near East Studies at Princeton University, where he directs the Institute for the Transregional Study of the Contemporary Middle East. He's a senior fellow here at FDD and the author or editor of foundational works on Salafism, Wahhabism, and the politics of the Gulf. He's also writing what will be the definitive biography of Mohammad bin Salman, the country, and its rise. It's called *The Realm: MBS and the Transformation of Saudi Arabia*, forthcoming from the Penguin Press. Few people have spent more time in the room, on the ground, and in the archives, understanding how the kingdom works, how the region works, and where MBS is taking it.

Bernie, welcome to *The Iran Breakdown*.

HAYKEL: Thank you. It's lovely to be here. It's nice to finally be in DC as well.

DUBOWITZ: Well, it's great to have you here. And obviously you've been a great mentor to me and a good friend and somebody who's helped me understand Saudi Arabia and the Gulf for many years. I want to jump in on the question of MBS and what the kingdom thinks about Iran. You're writing this definitive biography of MBS. You've had unprecedented access to the man. And after all the time you spent with him and with the system, how does he personally understand the Iranian threat and how has that changed over the years? And where do you think this relationship between Riyadh and Tehran is going?

HAYKEL: Okay. Well, I think the thing about MBS is that he was mentored and educated by his father. And his father, has a very keen – this is King Salman – has a very keen sense of history and is extremely aware of the nature of the Iranian regime, both before the revolution in 1979, when Iran also had hegemonic ambitions over the region, and since the revolution. Now, since the revolution with Khomeini, the leader of the revolution – Ayatollah Khomeini, who preceded Ayatollah Khamenei, who was recently killed – the view of the Iranian mullahs was that the regime in Saudi Arabia had to be toppled, that it could not – that the world would remain a world of injustice as long as the Al-Saud, the Saudi royal family, controlled Mecca and Medina. And he had very nasty words in describing the Saudi royal family. So, someone like MBS knows that the Iranian regime is an existential threat to both his dynasty and to the political – to the way Saudi Arabia is politically constituted, and that they will always want to control and have ambitions over Mecca and Medina.



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And you can see this, by the way, in popular culture that is produced by the Iranian revolutionary regime, where you have songs that constantly vilify and excoriate the Saudis, mainly describing them as lackeys of the West, as traitors, as bad Muslims or heretics and so on. So, these Iranian mullahs view Saudi Arabia in the same category as they would view, say, Israel – a country that they would want to see existentially annihilated – eliminated. So, he has no illusions about the nature of the regime, and that this is a regime that threatens him. Now, what has changed with him is that he has tried every possible tactic to try to contain and ward off the dangers of this regime. Initially, when his father came to power, acceded to the throne in 2015, MBS was extremely aggressive, comparing Khamenei to Hitler, saying that we'll take the fight to them if they fight us, mainly meaning that he'd mobilize the minorities – ethnic minorities in Iran against the regime.

He said things like, "If they acquire a nuclear weapon, we would acquire a nuclear weapon." He saw them as building a Hezbollah-like force in Yemen with the Houthis and stationing rockets and missiles on his border. So, he really was extremely aggressive. The problem though for him is that his military capability to fight the proxies in Yemen, or even to fight the Iranians directly, is very limited because the Iranians, as we know, play with either proxies and/or cruise missiles, ballistic missiles, drones, and so on. So, they play very dirty and they don't fight a conventional war. And his army is basically constituted to fight conventional wars. And so, he's weak militarily vis-à-vis Iran. So, he's tried different things. And then when he couldn't defeat the Houthis in Yemen, because he wasn't willing to send his army in to fight them – because he was worried that you'd end up with a Vietnam-like situation with the Saudis there or an Afghanistan-like situation – what he ended up doing was try to adopt a different policy with Iran, which is like let's see if we can placate them for some time, hoping that Khamenei would die and that the next regime, over say a five to ten year period, would be less revolutionary and more nationalist. He wants them to become more nationalist and to abandon the revolutionary ideology.

(CROSSTALK)

DUBOWITZ: And some of the transformation that took place internally within Saudi Arabia. Is that fair to say?

HAYKEL: Yeah. And in a way similar to that. But unlike Saudi Arabia, I believe that the regime in Iran will never abandon this ideology because if they do, their *raison d'être*, their very reason for existing would cease, and it's the glue that holds those revolutionaries together. So, without vilifying America, without vilifying Saudi, without wanting to destroy Israel, there's no reason for this mullahs' regime to exist. Because they inflict tremendous suffering and pain on their own people in the name of the cause of the revolution, for projecting and fighting this war. So, they would lose. And so, I think his attempt at *détente* with the Iranians, which ended up in an agreement in March of 2023 with the resumption of diplomatic relations – they had shut down their embassies after...

DUBOWITZ: This was brokered by the Chinese.

HAYKEL: This was finally kind of brokered. The Chinese kind of gave their imprimatur at the end. And the inclusion of the Chinese was, again, MBS's way of saying, "Which country out there has the most influence over Iran? It's likely to be China. So maybe we can get the Chinese to put some pressure on the Iranians to stop their nefarious activities, their attacks on us and their attacks on us through proxy and so on." Obviously, that didn't work, right? Recently, the Saudis – in this last war – the Saudis have been the victims of an Iranian – repeated Iranian attacks. And the Saudis, MBS that is, asked the Chinese to put pressure on the Iranians, and the Chinese basically refused. So, he's now in a situation where the *détente* strategy has also not worked. And does he go back to the very aggressive form of dealing with the Iranians as the UAE is doing, or does he try to find some other kind of medium, like a middle way between the UAE and *détente*?

This is all now being discussed in Riyadh as we speak – in the Royal Court – as to what's the best way to proceed.



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DUBOWITZ: It's interesting, Bernie, because this middle way between the UAE and other countries in the Gulf was kind of on full display, I thought, in the lead-up to the February 28th war, where publicly MBS was talking about not allowing the United States to use Saudi bases, publicly lobbying against President Trump to initiate major military operations against the Iranians. And yet privately, there was some reporting that he and other Saudi officials were actually encouraging the United States to hit the regime in Iran hard. And then since the war has started, there's also been public reporting that on one hand they want to see some kind of ceasefire and negotiations. On the other hand, they don't want to leave this regime standing – kind of a wounded animal with half of its missile capabilities still intact, still tens of thousands of drones, and having now shut down Hormuz to Saudi oil shipments. They want to see the United States not walk away from this.

Is that Saudi Arabia sort of playing both sides of the tent?

HAYKEL: So, I mean, they certainly don't want the US to walk away from it. I think the Saudi view is still quite ambivalent. They want Iran contained; they want the regime to stop its aggression. They're worried that if the regime fails completely and you end up with a civil war like Libya in Iran, you would end up with chaos, and then that would affect them with refugee flows and so on. So, I think that they're, frankly – maybe one way to describe how they think about all this is that they're very ambivalent, maybe confused. They don't really see a silver bullet solution to this. They want – yes, they want pressure on Iran, but not so much pressure that you end up with chaos. The reason for their ambivalence is this, and it's a very simple thing actually. Saudi Arabia depends for at least 65 percent of its water consumption on desalination.

These desalination plants are on the Persian Gulf, on the coast, and they're also on the Red Sea, and they're extremely vulnerable. And if the Iranians hit them, you can't quickly fix them. It's not like a pipeline that can be quickly repaired. It would take a very long time. And you have cities with seven, eight million people – like Riyadh, for instance – that would probably have to be evacuated. So, for them, an attack on desal plants is the equivalent of a nuclear weapon going off in their country. And they don't have a way to defend against that. So, the way I see the Saudi position is one of a defensive crouch, because of fear that if the Iranians get to take a shot at them, then they would have a real problem kind of dealing with the humanitarian consequences domestically.

DUBOWITZ: Right. I mean, it's interesting to contrast the approach of Saudi Arabia with the UAE, for example. And I want to talk about some of the other Gulf states like Oman and Qatar and Bahrain as well. But I mean, if you really think about Saudi Arabia and the UAE with respect to Iran, they've taken very different approaches, at least publicly. And the Emirates – finally, after years of allowing Dubai to be used as a sanctions-busting, money-laundering jurisdiction for Iran – they seem to have started to crack down on that. So financially, like cutting off this sort of financial lung of the regime. Militarily, again, public reports – not clear if it's true or not – but that the Emirati Air Force and Emirati military has been involved potentially in offensive operations against the Islamic Republic, and also obviously very close cooperation with Israel. There was a report out recently that Israel actually provided the Emirates with the Iron Dome air defense system, as well as the Barak system, which had been very useful to the Emirates in defending against the drones and missiles that have been fired at the Emirates.

So, taking a very aggressive posture, but one very closely aligned with the United States and with Israel in this war. And then Saudi Arabia, as you say, more ambivalent. I don't see any evidence they're involved in military operations. Clearly the United States has been defending Saudi Arabia, but it'd be interesting to ask you the question about whether a closer relationship with Israel would have been more useful to them in terms of air defenses and other Israeli defense technology, or would it have put them in the crosshairs of the Iranians and their desalination plants at risk? And then financially, what's your sense on the financial side in terms of Saudi – the financial and intelligence picture specifically? Are they choking off Iranian money flows? Are they shutting down sanctions evasion networks? Or is there very little business between Saudi Arabia and Iran to begin with, and it's not like Dubai?



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HAYKEL: No, the Saudis really have very little business with the Iranians. And in fact, the Saudis, after 9/11 – several years after 9/11 – instituted all kinds of policies for controlling money flows. And this was mainly because of Al-Qaeda and ISIS. So, I don't think there's any financial dealings between the Saudis and the Iranians. And as I said, I mean, the Saudis really do see the Iranian regime as an enemy regime and an existential threat. So, I don't think they would work with them or help them in any way. The Iranians, though, have been, I think, quite clever. What the Iranians have done is they've tried to split the GCC [Gulf Cooperation Council] countries. And you can see this in the targeting, by the way. The number of missiles and drones that have hit the UAE is much more – in fact, more than Israel, and certainly much, much more than Kuwait or Saudi or Bahrain or Qatar.

And so, this is, I think, a deliberate policy on the part of the Iranians to try to say that the UAE – because of its treaty, because of the Abraham Accords with Israel – is the real enemy. And they've said this kind of openly, that they're actually trying to topple the regime there. And if you listen to one of the Iranian shells, an Iranian professor called [Mohammad] Marandi – I mean, it's just very clear. And so, I think that the UAE feels genuinely that there's a zero-sum competition here with the Iranians. It's like either we survive or they survive, but the two can no longer coexist. And that's why they've taken these positions. They've also benefited from the Israelis in terms of defense. It's a much smaller territory to defend. I mean, Saudi is huge – it's bigger than Western Europe. And I think also that the Saudis have a long kind of bureaucratic and diplomatic tradition of being super cautious, preferring to pay – like use what is called checkbook diplomacy to try to ward off threats.

And you still have remnants of those people in the system, in the kingdom. So, when MBS is thinking about Iran, he'll have a variety of views saying, "In the past we've done this and it's worked, and you don't need to go super aggressive on them, maybe let's try this instead," and so on. So, I think that he is really trying to – trying every possibility, including the Pakistanis. I mean, the whole Pakistani effort at mediation is strongly endorsed by the Saudis. And it actually is in part – and so let me back up a bit. Before the war last year, the Saudis signed a mutual defense agreement with the Pakistanis. The idea was that because Pakistan has strong ties with Iran, that mutual defense agreement would act as a deterrent. It would help stop the Iranians from attacking Saudi Arabia once the war started, which the Saudis believed it would.

That didn't work. So, the Pakistanis, given their strong ties to the Chinese, said, "We will do everything to bring the Chinese on board to get the Iranians to stop." And then that didn't work either. And then the Pakistanis also sent airplanes and pilots to Saudi Arabia, saying that they will help defend Saudi Arabia – not from Pakistan, but from Saudi – should the Iranians keep attacking. So, this is one of the many ways the Saudis have tried to defend themselves. I mean, clearly, they're not like the UAE, they're not as aggressive. And you can see this today, by the way – even in today's news – where the UAE dropped out of OPEC and OPEC+ to pursue their own independent oil policy. And this again has to do with not wanting to be tied to a Saudi-dominated oil cartel that was constantly restricting their production. They want to just do whatever production they want to do.

And they are planning to build up to five million barrels of daily production capacity by 2027, I believe. They're at four now. So that's a huge amount of oil. I mean, they will be like another Saudi Arabia in terms of spare capacity in oil markets. So, the UAE is kind of its own – much more aggressive, much more independent. But again, because they just don't see – they're tied to the West, they're tied to America, they're tied to Israel, they've made their bets and they put their chips there. And the Saudis are still trying to put their chips on multiple numbers and trying to see if – what combination will work. Sooner or later, I think the Saudis, though, will have to revert to the UAE position, because I don't think this Iranian regime is going to give up Hormuz easily and they're not going to give up on their ballistic and drone capabilities.



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And they're always going to be an extorter, trying to extort the Gulf countries for passage, for security and safety. It's like a mafia or living next to an arsonist who's constantly threatening to burn your house and is willing to burn their own house. So, you have to pay them not to do it. And I think the Saudis are not going to be comfortable with that situation long term.

DUBOWITZ: So you think – I mean, after putting chips on multiple numbers that didn't come up, the Chinese play, the Pakistani play, trying to hedge, and obviously hedging with the Russians as well – you think MBS is moving closer and closer to a realization that at the end of the day, his security and the security of the kingdom and the prosperity of the kingdom depends on close alignment with the United States and Israel?

HAYKEL: Yeah. I think certainly the United States – that's not going to change. And I think when it comes to Israel, he's likely to want some of the kit that the Israelis have because it works. So, he's a very practical guy. He's not an ideologue and he's a nationalist. I mean, if there is an ideology there, it's a nationalist ideology. And whatever is in the strategic interest of Saudi Arabia, he will do. I mean, he's not going to adopt ideological positions of resistance to Israel or resistance to empire or resistance to the West – none of that matters to him at all. It doesn't resonate.

DUBOWITZ: I mean, what's interesting to me is that if I were MBS – I've met MBS a couple of times, but obviously I haven't spent as much time with him as you have. By the way, very interesting guy, very affable, very charming, very smart in how he thinks about the region, the global competition between the superpowers, and Saudi Arabia's role. And I think for anybody who's been in Saudi Arabia pre-MBS and now during MBS, the transformation of the country is extraordinary...

HAYKEL: Yep.

DUBOWITZ: ... in every way. But it would seem to me that if I were looking at American political vicissitudes in 2029 – President Trump gone, whoever's in the White House, a Democrat who's not likely to be pro-Saudi, a Republican who may be skeptical if it's not Marco Rubio – that he would be worried about where the United States would be going with respect to the US-Saudi relationship, the defense of Saudi Arabia against a still-hostile Iran, and a recognition that the only real military power that is in the Middle East and is staying in the Middle East is Israel, at least the only military power that's going to be of any assistance to him against the Iranians.

I mean, the Turks are a military power, but I don't see the Turks defending Saudi Arabia against an Iranian threat. That would seem to me to increase the likelihood of greater US-Saudi-Israel normalization...

HAYKEL: Yes.

DUBOWITZ: That triangular relationship. Is that where you see things going?

HAYKEL: Well, I definitely see that the calendar – in terms of time – so, 2028 will be the end of President Trump's second term, and I think MBS would ideally want to lock in as many agreements with the US and Israel as possible, because it's a package. And I think it is presented to him as a package before President Trump leaves office. And that package would involve not just normalization, which would be staged – so it's not like automatic, immediate visits between leaders and embassies and so on; there would be a process as he sees it – but also it would involve all kinds of commitments from the United States to Saudi Arabia, including a much stronger mutual defense agreement, a nuclear agreement. He already has the AI agreement, but he could beef that up some more. He would want weapon sales to be streamlined and made more – less onerous in terms of congressional oversight.

So those are the kinds of things that he wants from the US. He wants to secure the safety and the strategic security of his country, and he can't do that on his own. He needs America and he needs, ideally, a kind of alliance system under CENTCOM that definitely would include Israel.



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DUBOWITZ: Let me ask you about the nuclear element of that, because there certainly has been quite a bit of discussion here at FDD and in Washington about the question of providing a country with domestic enrichment capabilities or plutonium reprocessing capabilities. And we've had a longstanding position at FDD that no country, ally, or certainly adversary, should be given the core nuclear capabilities that it could use to produce nuclear weapons. And of course, we've had a quite outspoken position for many years that the Islamic Republic of Iran should never get that. And that's why the Joint Comprehensive Plan of Action, the JCPOA, in 2015, was a fatally flawed agreement – because it surrendered enrichment and reprocessing to the leading state sponsor of terrorism, and then had these restrictions that would sunset over time and Iran would emerge with this industrial-size enrichment capability that would allow it, at a time of its choosing, to develop nuclear weapons.

But we've also adopted a position that Saudi Arabia – even though we obviously see Saudi Arabia as a close US ally – should also not have these enrichment capabilities. Because again, this kind of gold standard of non-proliferation, which the Emiratis have signed up to, amongst others – you can have a civilian nuclear program, and you can buy your fuel rods on the international market. You don't need that capability that could be turned into nuclear weapons capability. How does MBS see this? What are some of the options with respect to a Saudi nuclear program, and how much of an obstacle would that be to concluding this broader comprehensive agreement between the United States and Saudi Arabia that also would bring in the Israelis?

HAYKEL: Right. So, my sense – I mean, first of all, I think you have to distinguish between rhetoric and reality, okay? And this is true for the Middle East in general. The Saudis will talk about wanting things, but whether they actually ever develop them or acquire them is another matter. Like, for instance, they want 16 nuclear power plants. I mean, that's a huge, multi-year investment, and I doubt we'll ever see that many nuclear power plants, if any, in the kingdom. The idea with having nuclear power plants is to be able to liberate more oil and gas for export. So given that, I think what the Saudis know is that they have large uranium deposits, and they want to be able to benefit from those deposits in terms of exports. Mining is kind of an extension of oil and petrochemicals in a way, so it's sort of in their bailiwick, right?

So, they want to develop those mines. Now, they've talked about wanting to process – and here there are a lot of rumors. Some say just yellow cake, some say no, much more. But if you look at the actual economics of processing and exporting, that doesn't make sense at all, right? So again, I doubt they'll ever – even if they say they want it – actually develop that kind of capability. What they do want is, as I said, to develop the uranium deposits. And what they also do want is protection from the potential of an Iranian nuclear weapon. And so, they've said publicly – he said, "If they acquire a weapon, we're going to acquire a weapon." I think there are many ways for them to get a nuclear umbrella and defense without them – they actually developing their own nuclear weapons. So, one idea that's been floated and that MBS has talked about is that he could imagine US nuclear weapons being based on Saudi soil, manned by US personnel, to protect him from the Iranians ever getting a weapon or actually having one.



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He also – there also have been talk that if they ever do processing, it wouldn't be them processing. Although it would happen in their country, it would be Americans doing it there, with all kinds of guarantees and so on. So, I think we're very far from any of that. What I do know he would want more than anything are two things. One is that he wants to develop those uranium deposits. Whether they are processed or not is a kind of second-order question, not a first-order question. And the other is that he wants a nuclear protection, a nuclear umbrella type situation, if the Iranians get a weapon, and he would be perfectly happy with the Americans providing that for him. He's trying to acquire – he's trying to link Saudi Arabia to the United States militarily and strategically, but also in terms of AI, technologically, in a way that – where he can turn around to his people and say, "I'm the first king who was able to deliver what no other king was able to deliver," which is not some sort of verbal agreement of protection, but actual – an actual treaty that protects us, an actual treaty that gives us the right to develop these deposits, an actual treaty that gives us U.S. nuclear weapons protection, an actual treaty on AI, and all of that.

So, he wants real wins, so that he can say, "I've put the Saudi national interest first before anything else." And no king has done that.

DUBOWITZ: It's interesting to me, because you mentioned Pakistan and the mutual defense treaty that Saudi Arabia and Pakistan signed last year. And it does remind me that it was the Saudis who actually financed the Pakistani nuclear weapons program. Is there any sense in Riyadh, and from MBS himself, that really at any moment MBS could pick up a phone, call the Pakistanis, and have a deliverable nuclear weapon in Riyadh within a couple of weeks?

HAYKEL: So, look, there's been a lot – we hear a lot about this possibility. I personally don't think so. And if the Saudis think that the Pakistanis will give them a nuclear weapon, I think they're dreaming, because what people often don't realize – including in the region, in the Middle East – is that a nuclear weapon is not just a weapon. It's a whole system, it's a whole culture, it's a whole way of dealing with the thing, and the Pakistanis have it, the Indians have it. But it's not just bringing a weapon over. And the Saudis don't have any of that. And that takes a generation to build that kind of culture for managing a weapon and handling it and so on. And the Pakistanis are just not going to hand that over to them. And they can't. I mean, it's just not – I don't think it's even feasible for them to do that.

DUBOWITZ: Yeah. And so, the question then is the mutual defense treaty. I mean, if I were the Saudis, I wouldn't trust a Pakistani mutual defense treaty. I don't know what that gets me. I don't see how Islamabad is at all reliable with respect to...

HAYKEL: He knows that, by the way, because in 2015, when they decided to attack the Houthis in Yemen and they asked the Pakistanis, the Pakistanis had a vote in Parliament and said no. So, they have experience with the Pakistanis not coming through for them.

DUBOWITZ: So obviously a mutual defense treaty with the United States is the gold standard, and that's certainly what MBS wants, and we would assume that there would be some very active negotiations going on right now to get that locked in before President Trump leaves office. But a mutual defense treaty or some architecture that binds Riyadh and Jerusalem together seems to make even more sense than having this Pakistani guarantee. I mean, if you've got the Israelis, who have nuclear weapons, who have a powerful military, who have a sophisticated AI industry, who have a sophisticated defense tech industry, and can provide not only technology but truly a fighting force that's capable of taking on Riyadh's enemies – not just the Iranians but also the Muslim Brotherhood, which I think for MBS he sees as a threat to the kingdom as well – locking in that relationship between Saudi Arabia and Israel with U.S. oversight and integration under CENTCOM would seem to me, if I were MBS, to be a real strategic benefit.



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And the question I have for you is not just on the strategic benefit element, which I think is obvious, but on the politics of that in the kingdom and how that plays to the Saudi people in the wake of October 7th.

HAYKEL: Yeah. So, I mean, I met with him – I think late August or September 2023, just before the attacks, September, I think it was 2023. And he gave an interview to Fox News at the time with Bret Baier where it was clear that that's exactly what he had in mind – exactly what you just described, which is this umbrella with Israel and the United States providing the CENTCOM and so on, providing the protection. And I think that would have happened had October 7th not taken place. Since then, what's happened is that you have a young generation of Saudis that was not politicized. His core constituency is the young, and those people weren't politicized. October 7th and all the images and the news coverage, especially from [AI] *Jazeera*, did politicize this generation.

DUBOWITZ: So, from *Al Jazeera*, owned by the Qatari royal family promoting their Islamist Muslim Brotherhood agenda, which itself represents a threat to the kingdom. So, MBS is getting this from all sides. From the Iranian side, from the Brotherhood, being stoked by the Qataris.

HAYKEL: And also, the social media that has a lot of Muslim Brotherhood ideology being promoted as well. So yes, that generation has become more politicized. And so, MBS does feel pressure from his own society that something should be done for the Palestinians, namely what they called an irrevocable roadmap to a Palestinian state. So those words, as far as I can tell, mean that he wants the Israelis to offer some sort of symbolic gesture to the Palestinians, begin negotiating with the Palestinians while retaining a veto. The Israelis would retain a veto over the outcome, meaning that whatever Palestinian state – if a Palestinian state should ever emerge – it would not have any of the things that the Israelis don't want it to have. And so that was the one thing that got added more seriously after October 7th. And I think it's mostly for domestic reasons.

And I suspect also that with time, that kind of desire for this will probably recede in terms of Saudi demand.

DUBOWITZ: You think it's going to recede in the wake of Iranian attacks on the kingdom?

HAYKEL: Yeah. Yeah, I think so. I think what this war has done is it's concentrated the minds of the Saudis in ways – and I think a lot of people in the Arabian Peninsula have had their minds concentrated in a way where it's become very clear that Iran is an existential threat to them, that they had planned for years to destroy the infrastructure of these countries, and that they have that capability without nuclear weapons. Also, that the Iranians can quite easily and cheaply block Hormuz. That I think was not known. I mean, the idea that they could try to block it was there, but just how easily that can be done – because of insurance rates and because of these tankers costing so much and how long it takes to build one – I think all of that came as a bit of a surprise to many.

And they are now talking – the Saudis are talking to the Kuwaitis and others – about building more pipelines so that everything gets transported from the East to the Red Sea. So, they're thinking about all kinds of ways to get around Hormuz, but ultimately you really can't, because it's not just about oil and gas. It's also about all kinds of other things that need to be transported, namely food. And so, the present situation is just unacceptable for them, and they will not allow the Iranians to be in control of that strait and essentially choking them at will. And so, I think all of that means that they're going to have to rethink a lot of their strategic posture, including what Israel can bring to the table for them in terms of protection and security, because they're going to privilege their protection and security over anything and everything else once this war is over.



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And you'll see it. I mean, for instance, they've become much closer to the Ukrainians because of the drones. They realize that the Russians are basically their enemies, because the Russians really want chaos and always have wanted chaos in the Gulf because their oil becomes much more valuable and precious. That the Russians are the main backers of the Iranians, and they've given them targeting data and information for the Iranians to hit places all over the GCC countries. So, I think a lot of the illusions that were there before have kind of disappeared, and you're going to see a much more realistic view and a set of policies on what really matters to them and matters to their security.

DUBOWITZ: Yeah. It's interesting you mention Ukraine, because, as you know, Bernie, the Foundation for Defense of Democracies – defending beleaguered democracies – certainly high on our list are the Taiwanese, the Israelis, and the Ukrainians. And I think Zelensky really has emerged as one of the most forceful and articulate European leaders at this time, perhaps the only European leader that has actually provided anything of value in this Iran war by sending anti-drone technology and anti-drone expertise to our Gulf allies to help them fend off these Shahed drone attacks. So yeah, the Ukrainians have really, I think, been exemplary allies. And I always talk to my friends on the right that this sort of anti-Ukraine, pro-Russia sentiment in elements of the Republican Party is just dangerous for American national security, as is this anti-Israel sentiment on the left in the Democratic Party. And really, it's Israel and Ukraine that have been exemplary, model allies over the past number of years.

HAYKEL: Well, they certainly carry their own water. I mean, they're not asking for U.S. troops to defend them, which is unlike many other so-called allies where they can't defend themselves.

DUBOWITZ: Right. I mean, they fight and unfortunately die in their own defense. You mentioned the Red Sea, and that sort of gets me to Houthi's geopolitics but also energy politics, because the Saudis and the Emiratis have been using two pipelines to move oil that has been blockaded in Hormuz out to the Red Sea. I think it's the East-West Pipeline that the Saudis use, and it's the Fujairah pipeline that the Emiratis use, and that's been moving about – what is it – five, six million barrels a day?

HAYKEL: Yeah. It's up to seven million on the East-West and 1.5 to Fujairah.

DUBOWITZ: Okay. So, I mean, that's seven and a half million barrels a day. I mean, that's been critical to keeping oil prices down and getting oil flowing. But it's moving into the Red Sea, and that brings up the issue of the Houthis, who were obviously attacking Red Sea shipping over the past number of years. And it's always been interesting to me why that dog hasn't barked; why the Houthis haven't gotten more intimately involved in this Iran war on behalf of their Iranian masters. What's your take on that?

HAYKEL: So, first, I think, to understand the Houthis – I mean, obviously there's an internal domestic Yemeni dynamic that explains their rise – but the Iranians were very able and very early on, from the 1990s, able to cultivate certain people in Yemen, eventually leading to the Houthi movement. And so, the Houthis are a proxy of the Iranians. They're not a proxy in the same way as Hezbollah is, though Hezbollah has played a very important role in developing the Houthi capability in drones and missiles. But the Houthis basically see themselves in alliance and in this axis of resistance with Iran. And the Houthis can actually create a real problem in Bab el-Mandeb, the entrance from the Indian Ocean into the Red Sea. And the reasons they haven't done this are two, I think – they haven't blocked it again. One is that there are rumors, and I suspect they're more than rumors, of the Saudis having paid them off not to attack Saudi Arabia.



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And these payments are not very major, but they've covered sort of the salaries of bureaucrats and some of the soldiers and so on. So, this is the sort of thing that the Iranians also want to do post-war, which is to basically extort for protection – and that's not sustainable. So, one reason is the payment. The other is, I think, the Houthis have been seriously weakened. I mean, the attacks that the Americans waged against them, and then the Israelis, have been quite devastating for them. And that's, I think, another reason they haven't been much more active. But the idea that you can build out pipelines – more pipelines – and that the Red Sea is safe and secure forever – which is what the Saudis and the Kuwaitis and so on are talking about now – is false. Because the Houthis can, if they have the capability – and they can easily get that capability – they can block Bab el-Mandeb again.

And that means you have a chokehold – two choke points, Hormuz and Bab el-Mandeb, closed. And that would be very, very serious. I mean, it would devastate the countries of the GCC, but it would also have a devastating effect on the global economy. Something like 14, 15 percent of all global trade goes through the Red Sea and up through Suez, and certainly it would mean no oil and gas coming out at all.

DUBOWITZ: So interesting from a Saudi perspective, if you're going to build more pipelines – I mean, you build more pipelines to the Red Sea, but you have that vulnerability with the Houthis. Clearly you cannot let the Iranians dominate Hormuz because Hormuz will always be a critical area where oil and other commodities flows. But if you're building pipelines, it'd be interesting to build pipelines that actually connect Saudi Arabia to Israel and then to the Mediterranean and then have the Mediterranean as a third outlet for your oil. I mean, do you see that?

HAYKEL: Well, there was already a pipeline, by the way, called the Tapline that actually brought Saudi oil from the Eastern Province. This was built in the '50s, and that ultimately ended up in Lebanon, but originally it was also supposed to – it could have easily gone to Haifa as well as a terminus for Saudi oil. So yeah, that pipeline existed. I mean, it would need to be redone and rehabilitated, but one could easily see that happening. And also, one can see that – again, this was something that was being discussed very intensely before the October 7th events – that there would be a corridor for shipments – for goods from India all the way to Europe via Saudi Arabia and then Jordan...

(CROSSTALK)

DUBOWITZ: This is the IMEC corridor, right?

HAYKEL: That's right. Yeah. So I mean, I think that when MBS thinks about the future of the region, he thinks about a kind of European Union – an economic – economically integrated zone – with his country as a major hub connecting Asia and Africa to Europe, and that Israel would be intimately part of that whole setup because, for the whole region to prosper, you need Israel to be included.

DUBOWITZ: Right. So, Israel brings access to the Mediterranean. Israel brings a powerful military. Israel brings...

HAYKEL: Technology.

DUBOWITZ: ...defense tech and other technology – cyber, AI, and other technology that the kingdom needs for its growth. And Israel – I mean, the Saudis can always assume, I think, safely, that Israel has no desire to bring down...

HAYKEL: That's right.

DUBOWITZ: ...the kingdom.

HAYKEL: Look where NEOM is being set up and built. I mean, NEOM is within spitting distance of Israel, right? If they were worried about Israel, they wouldn't build their futuristic city there.



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DUBOWITZ: Well, actually, with NEOM, I want to ask you about Vision 2030 and the broader project because – so Vision 2030 was, I think, built on the assumption of a stable region and a globalized kingdom, open for tourism and sports and capital. And now you've got war on its borders, you've got drones, you've got missiles, you've got attacks against oil infrastructure, you've got existential threats to desalination. How survivable do you think 2030 is in this environment? And add to that, how is 2030 going? I mean, you mentioned NEOM, which has had some serious problems getting off the ground, and clearly the Saudis have been shutting down or scaling back on other giga and mega projects. What's your assessment of 2030 today?

HAYKEL: So, first, you're right that the whole plan is about diversifying the economy of Saudi Arabia – making it less dependent on oil and gas and petrochemicals and developing new sectors of the economy. That's what Vision 2030 is about. Tourism is part of it. AI is another. Logistics, travel, all kinds of areas – manufacturing as well. Logistics. None of that can really fully develop if the region is not stable. And for Saudi Arabia, the region means not just Iran being kind of less hostile, being kind of friendly, but also an end to the civil war in Sudan, an end to the wars in Yemen, the security and stability of Jordan and of Iraq. So often when you talk to, let's say, Saudi leaders – this is not MBS, but let's say the head of intelligence – will tell you something like: we are a beautiful garden surrounded by wildfires all around. And we want to keep this garden, but we also want the fires to go out.

DUBOWITZ: Yeah. The Israelis say that they're a villa in a jungle, so they're using different metaphors to underscore the same concept.

HAYKEL: Yeah, the same idea.

So definitely you need all of that for it to happen. Now, turning to Vision 2030 itself, and whether it's successful or not, I think the record is mixed. So, for instance, on many issues, Vision 2030 has been successful. On the social transformation – the making Saudi Arabia feel like a normal place rather than a place where zealots run around making life hellish for young people, especially for women, the incorporation of women into the workforce – I mean, it's nearly tripled. Removing all the guardianship rules that constrain the lives of women, that's also gone. So, I think on the domestic front – having all this entertainment, Saudi Arabia being a place where you can have fun, where there are comedy cellars and movie theaters...

DUBOWITZ: I mean, I think Riyadh's a great place to go now.

HAYKEL: Yeah. It's an awesome place to go and people are really friendly and nice. So, on all of that, it's been very successful. On the economic front – oh, also, I mean, if you look at the numbers, the percentage of home ownership has gone up significantly because they have new mortgage plans. If you look at – on a number of core metrics, it's been quite good. On some issues, it hasn't. Like, for instance, a number of these giga projects are just way too expensive and too exotic, and the country doesn't have the money for it because the price of oil has been low, relatively speaking. Now, of course, if the price of oil hits 150 and stays there for 10 years, I think they can pay for everything.

DUBOWITZ: Assuming they can get their oil shipped.



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HAYKEL: Excuse me. Yes. But they will be able to pay for all of it. But given reality and given that they don't want to acquire more debt, they've had to cut back and scale back on a number of these big projects, NEOM being one of them. But NEOM has now been recast as an AI place where you can build AI data centers because land is available, energy is virtually free, there's no regulation or minimal regulation. So, there are a lot of comparative advantages that Saudi Arabia has, and there's a lot of capital still for that kind of thing. So Saudi Arabia still has a comparative advantage in a number of those areas. So, I think the record is mixed. They never thought they would fully fulfill all of those targets. I've always felt, from the beginning – and I was there when it was launched in April, I think, of 2016 – that if they hit 30 percent of their targets, that would be pretty good.

Because before Vision 2030, there was no vision. And all they were relying on was a bloated civil sector, basically employing all their people in the government and relying on oil revenues to pay for those salaries – that is unsustainable. And if they had continued, as they had done under the previous king, King Abdullah, Saudi Arabia would be bankrupt by now. I mean, it really would be in dire, dire straits.

DUBOWITZ: But it seems so much in Saudi Arabia is dependent on this one man, who you're writing a biography about and about the transformation that's taken place in the kingdom. And one doesn't want to talk about this and put bad omens in the universe, but I am reminded, when I am in Riyadh and I am talking to MBS or talking to other Saudi officials, that there are two kinds of disaster scenarios in my mind, and they're represented by two historical personalities. One is Anwar Sadat, and the other one is the former Shah of Iran. The Sadat one is obvious. I mean, Sadat makes peace with Israel. Sadat wants to transform Egypt from a Soviet-backed failed state into a pro-Western successful state, and he goes to the Camp David Accords, and he's assassinated by Islamist zealots. The Shah wants to transform Iran again into a pro-Western country that is aligned with the United States and is prosperous, and he gives rights to women, and he frees Iranian society and the economy starts to boom.

And there again, the Islamist zealots oppose him, and Ayatollah Khomeini takes over.

HAYKEL: Yeah.

DUBOWITZ: Is there a chance that MBS could be Sadat or could be the Shah of Iran?

HAYKEL: Well, I mean, look, there's always the possibility of an assassination attempt on his life. And he's very, very important, certainly, because a lot of these ideas about the vision are rooted in his own personal vision for the country. But there's a fundamental difference between the Saudi regime and the one in Iran and the one in Egypt. First, this is not a one-bullet regime. I mean, there are a lot of princes who can easily become the next king. So, – it's also a family that's deeply rooted. Saudi Arabia has been around since the first half of the 18th century, so it's older than the United States. And this is a family that united this country. The country exists because of what this particular family has done. So, their legitimacy is quite deep and well entrenched. And again, it's not just about one person.

You might get someone else – if God forbid, MBS is assassinated – who has a somewhat different vision. But he's trying to lock in a number of things that will make it impossible for the next king to change. Like, for instance, on women's issues, I don't think that's going to go back to the way it was.

DUBOWITZ: So, he's institutionalizing his vision within the Saudi system, and so Saudi Arabia was not a one-bullet country with Sadat. Is there a chance that it could be like 1970s Iran, where all of these transformations – socially and economically – are infuriating the Islamists, both inside the country and outside the country, and you get some kind of Saudi Khomeini?



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HAYKEL: Right. So, I'm sure that there are Islamists in Saudi Arabia and that there are conservatives who are not happy with a lot of what's been happening. But the more vociferous ones are in prison. So, this is an authoritarian regime that does repress its opposition, especially if it feels...

DUBOWITZ: But they were in Iran as well, in the 70s.

HAYKEL: Yeah, but there's a qualitative difference between them. And also, in the case of Iran, the Shah was a Westernizer. I mean, he presented himself almost as an anti-Muslim Westernizer in the Atatürk, Turkish kind of mode. He was a secularist. MBS is not a secularist. MBS is not against Islam. He has no problem with Islam being an integral part of Saudi identity. Religion is important to him, it's important for the country. So, he's not presenting any of this as anti-Islam. In fact, he's trying to say that his view of Islam is what allows all of these changes to happen. So, he's pushing this very much with an Islamic orientation, but one where Islam is a personal religious matter, rather than, "I'm going to impose one particular version of the Sharia on all of you – of Islamic law – on all of you."

So he's anti-Islamist, but he's not anti-Islam. And I think that's a profound difference between him and the Shah.

DUBOWITZ: What is – this was a fascinating conversation. I just want to get to the last question. I mean, you spend more time with MBS than any other Western scholar. I guess question one is: when the dust settles on this Iran war, does MBS come out of this stronger, more constrained, more exposed? And second question is: what's the one thing you think Washington still misunderstands about the man?

HAYKEL: So, I mean, I think that as far as the war is concerned, it really depends on whether we see this humanitarian catastrophe unfolding. So, if the desalination plants are hit, then this will be a crisis like one the Saudis have never, ever faced before. And I suspect that it'll harden the country rather than soften it and it'll make MBS even more powerful than before. So, my sense – if I were betting – I would say this war will lead to a much more powerful and much clearer vision of what is in the Saudi national interest. But certainly, he doesn't want the US to leave the Iranians in control of Hormuz, that's for sure. And he doesn't want the Iranians to have a nuclear weapon. So, in that respect, he's totally aligned, it seems, with what President Trump wants right now. In terms of what is misunderstood about him is that I think in the popular imagination in the West, especially in the liberal media, there's a lot of prejudice about Arabians – people from Arabia, and about Muslims – but especially Muslims from Arabia.

And they think of him as kind of this spoiled brat, this prince who essentially is just interested in having fun and partying and having a wild time and so on. And what I've seen of him is more like a monk. This is a person – yes, he does play video games, and he does have a comfortable life for sure – but he has dedicated his life to the transformation of his country. I mean, we may disagree with the vision of the transformation that he wants, but this is a person who's putting in long, long hours and totally devoted to his country and to the wellbeing of his people as he sees those things. So, he's kind of like King Faisal, a previous king in Saudi Arabia who was also very, very devoted and kind of almost austere in his – MBS, for instance, doesn't travel overseas.

He doesn't vacation overseas. He's always in the country, has been for many years now. It's very unusual. Saudi kings and Saudi crown princes and so on were constantly partying in Marbella and in Marrakech and had palaces everywhere and were having fun and so on. Not MBS. He's working 24/7, 365 in the country. That's very unusual.

DUBOWITZ: But you mentioned liberal media and the criticism of MBS. And let's be fair. I mean, he has made moves. I mean, he's put women's rights activists in jail, gone after his opponents – including those in the kingdom and outside the kingdom.

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HAYKEL: Yeah.

DUBOWITZ: So, there is this human rights issue with respect to the kingdom.

HAYKEL: For sure. For sure.

DUBOWITZ: What do you think is behind that? I mean, is there a sense that for MBS, "I'm going to transform this country, but don't get ahead of me. I'm going to let women drive and join the workforce and I'm going to relieve them of these guardianship rules, but don't be an activist trying to force me to do that. Because if you get ahead of me, then there are going to be consequences. Oh, by the way, on the Islamist side, if you're an Islamist and you're of the old Saudi guard, don't criticize me or try to get ahead of me. I will transform the country at my own speed, and if you try to get in the way of that, you're going to end up in jail." Is that – on both sides – is that the sense?

HAYKEL: So, I think first of all, he's an authoritarian and he's repressive, and he doesn't hide the fact that he's an authoritarian and that he's repressive. The way he, I think, justifies the repression is to say, "I'm transforming this country in very major and dramatic ways, and to maintain order and stability, I need to be repressive." That's the classic kind of argument of all authoritarians. They justify repression in the name of order and stability. I think there's another element, though, to why he does what he does, which is that he's not a democrat. He's saying that if change comes, it comes from me. It comes from the top. It's never going to come because of popular mobilization or civil society type activism. So that's the other side to his political vision, which is one where people can talk to him, they can advise him, they can counsel him – especially in private – and he has a very keen sense of the pulse of the country.

He's constantly polling. I mean, there are constant daily polls of everything and sentiment analysis of the population. I've told him once that it's much more taxing to constantly poll your population than just have elections, because with elections it's very clear and you don't have to constantly worry about what they're thinking. But he's constantly worried and thinking about what his own people are thinking. But essentially, he is someone who wants change to come from the top and not from the bottom.

DUBOWITZ: Bernie Haykel, thank you so much for being on *The Iran Breakdown*.

HAYKEL: Thank you.

DUBOWITZ: Bernie Haykel, an extraordinary conversation. A masterclass on a kingdom in transformation and a regime being remade. For our listeners, keep an eye out for Bernie's forthcoming book, *The Realm: MBS and the Transformation of Saudi Arabia*, coming from Penguin Press. You want to understand where Saudi Arabia goes next and therefore where the Gulf and the Middle East go next – that's the book you'll want on your shelf. The bottom line from today: the Iran question and the Saudi question can no longer be analyzed separately. The trajectory of the Islamic Republic – whether it collapses, consolidates, or sprints for a bomb – will shape Saudi nuclear choices, the future of Vision 2030, the prospects for normalization with Israel, and the architecture of American power in the Gulf for the next generation. Riyadh is no longer a passive recipient of regional events. Under MBS, it's an actor – sometimes a hedger, sometimes a mediator, sometimes a quiet hawk – but never again a bystander.

Understanding how MBS thinks is essential to understanding how this war ends and what comes next. Thanks to Bernard Haykel for joining us. Thanks to FDD for making all of this work possible. And thanks to all of you for listening. I'm Mark Dubowitz. This has been *The Iran Breakdown*. Until next time, when we break it down all over again.